



1F 3624  
Attorney Docket: J1-02

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Applicant: W. Richard Jones  
Serial No.: 10/015,003  
Filed: December 11, 2001  
Title: Long-Term Investing

Examiner: MILLIN, Vincent A  
Art Unit: 3624

Commissioner For Patents  
US Patent & Trademark Office

**SUPPLEMENTAL INFORMATION DISCLOSURE STATEMENT**

Pursuant to the duty of disclosure under 37 C.F.R. §§1.56, 1.97 and 1.98, the Applicant submits this Supplemental Information Disclosure Statement.

This Information Disclosure Statement is being **filed before the mailing date of a first Office Action** on the merits in the above-captioned application. **Therefore, no fee is required.**

The Applicant hereby makes of record in the above-identified application the information listed on the attached form PTO-1449 (modified). Copies of all non-US patent publications are enclosed.

The order of presentation of the references should not be construed as an indication of the importance of the references. The submission of the references should not be construed as admission of prior art.

Respectfully submitted,

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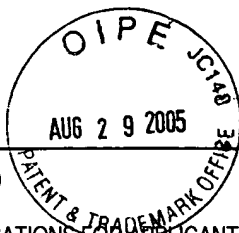
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**CERTIFICATE OF MAILING UNDER 37 C.F.R. §1.8(a)**

I hereby certify that this document is being deposited with the United States Postal Service with first-class postage attached, in an envelope addressed to Commissioner for Patents, P. O. Box 1450, Alexandria, VA 20231-1450, on

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Ivan D. Zitkovsky



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|---|-----------------------------|------------------------|
| <b>FORM PTO-1449 (Modified)</b><br><br>LIST OF PATENTS AND PUBLICATIONS FOR APPLICANT'S<br>INFORMATION DISCLOSURE STATEMENT | ATTY. DOCKET NO.: J1-02US   | SERIAL NO.: 10/015,003 |
|   | APPLICANT: W. Richard Jones |                        |
|   | FILING DATE: Dec. 11, 2001  | GROUP: 3624            |

## U.S. PATENT DOCUMENTS

| Exam<br>Init | Ref<br>Des | Document No. | Date    | Name           | Class | Sub<br>Class | FILING DATE<br>If Appropriate |
|--------------|------------|--------------|---------|----------------|-------|--------------|-------------------------------|
|              |            | 20010042037  | 11/2001 | Kam et al.     |       |              |                               |
|              |            | 20020059123  | 05/2002 | Dunning et al. |       |              |                               |
|              |            | 20020059126  | 05/2002 | Ricciardi      |       |              |                               |
|              |            | 20020059127  | 05/2002 | Brown et al.   |       |              |                               |
|              |            | 20020062272  | 05/2002 | Kim et al.     |       |              |                               |
|              |            | 20020062271  | 05/2002 | Breuninger     |       |              |                               |
|              |            | 20020069149  | 06/2002 | Maxwell et al. |       |              |                               |
|              |            | 20020099636  | 07/2002 | Narumo         |       |              |                               |
|              |            | 20030004846  | 01/2003 | Schneider      |       |              |                               |
|              |            | 20030018556  | 01/2003 | Squyres        |       |              |                               |
|              |            | 20030023532  | 01/2003 | Bolt           |       |              |                               |
|              |            | 20030009405  | 01/2003 | Kiron et al.   |       |              |                               |
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|              |            |              |         |                |       |              |                               |

## FOREIGN PATENT DOCUMENTS

|  |  | Country &<br>Doc. No. (11) | Pub.<br>Date (43) |  | Class | Sub<br>Class | Translation<br>Yes No |
|--|--|----------------------------|-------------------|--|-------|--------------|-----------------------|
|  |  |                            |                   |  |       |              |                       |
|  |  |                            |                   |  |       |              |                       |
|  |  |                            |                   |  |       |              |                       |

## OTHER ART

(Including Author, Title, Date, Pertinent Pages, Publication, Etc.)

|  |  |  |   |
|--|--|--|---|
|  |  |  | Jones, Robert. "Earnings basis for weighting stock portfolios." Pensions and Investments. August 6, 1990.                                     |
|  |  |  | iShares Trust Supplement dated August 17, 2005 to the Prospectus dated August 1, 2005 for the iShares Russell and S&P Index Funds pages 1-109 |
|  |  |  |   |
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| EXAMINER | DATE CONSIDERED |
|----------|-----------------|

EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609; Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.